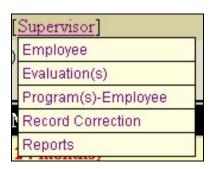
SUPERVISOR

NOTE: In order to have the Supervisor role on the ETMS, your Profile has to reflect a supervisory classification and at least one Employee has to select you as their Supervisor in their profile. It takes four to six weeks for a classification change to occur on the ETMS.

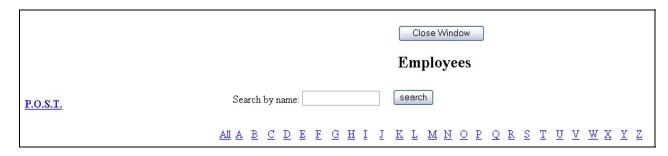
OVERVIEW: As a Supervisor, you will have all the functions of an Employee (see Employee Help Files).

The Supervisor Role will allow you to manage the Training Requirements of all Employees who have selected them as their Primary or Alternate Supervisor. There are three additional tasks on the Supervisor's Home Page, the Supervisor drop down menu, the Training Request Management Bar and the Course Leader Management Bar.

I. SUPERVISOR DROP DOWN MENU: By placing the mouse on the [Supervisor] link, five management tasks will appear on a drop down menu: Employee, Evaluation(s), Program(s)-Employee, Record Correction and Reports. The drop down menu will look similar to this:

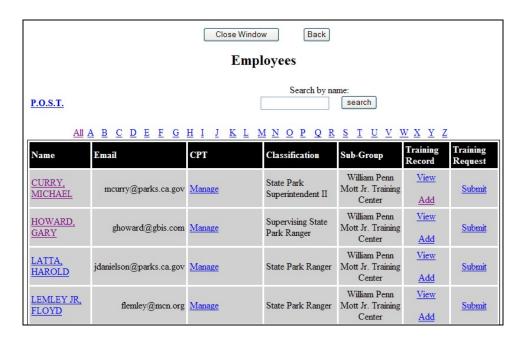


A. Employee: By clicking the **Employee** link within the drop down menu, a page will appear that will look similar to this:



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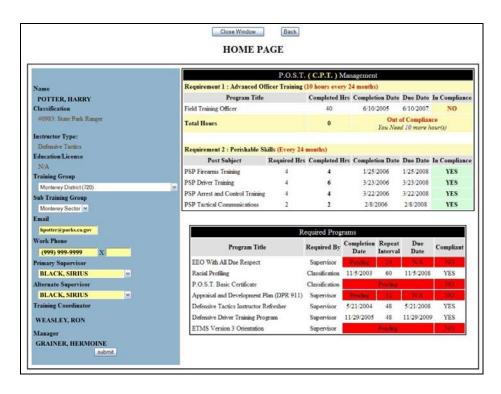
1. **Employee Listing**: The Supervisor can search for an Employee based on a keyword or A-Z listing. To search by a keyword, type in the first or last name and click **search**. The screen will look similar to this:



NOTE: Review your Employee listing to insure that all Employees are listed and are in the correct Sub-Group. Any missing Employee needs to update their profile.

a. **Home Page**: To view the details of an Employee's Home Page, click the Employee's name. The Supervisor will be presented with a screen that will allow them to edit the Employee's profile and view required training program compliance. The screen will look similar to this:

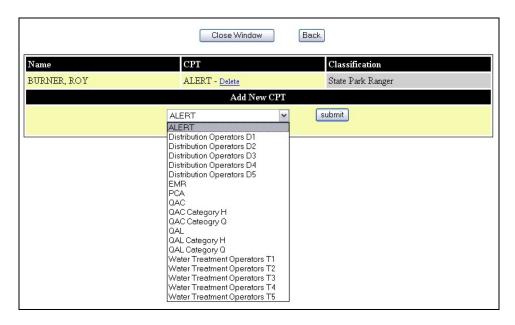
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- (1) **Edit Employee's Profile**: To edit the information in an Employee's Profile do the following:
 - (a) **Training Group**: To change the Employee's Training Group, select the new Training Group from the drop down menu. This allows the system to load the Sub-Groups and Supervisors.
 - (b) Sub-Group: To select, click the down arrow and select the appropriate Sub-Group or select N/A if not assigned to a Sub-Group.
 - (c) Supervisor(s): Select the Supervisor from the drop down menu as Primary and a different name as Alternate if applicable. If the Employee does not have an Alternate Supervisor, select the same name for both Primary and Alternate.
 - (d) **Email**: Enter the Employee's current email address.
 - (e) **Work Phone**: Enter the Employee's current work phone number.
 - (f) Submit
 - (g) **Back**: Click the back button to return to Employee listing.
- (2) **Required Training Programs**: From the Employee listing, click the name link to view required training programs and compliance in the following areas.
 - (a) P.O.S.T. Management, if applicable.
 - (b) Required Programs, if applicable.

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- (c) Continual Professional Training (CPT) Management, if applicable.
 - [1] Click the YES/NO link to view compliance details.
- b. **Continual Professional Training (CPT)**: Supervisors have the ability to manage CPT for their Employees.
 - (1) Add CPT: Click the Manage link and choose the type of Certification from the drop down menu and click submit. The screen will look similar to this:



- (a) Certification will now appear in the CPT column on the Employee list and on the Employee's Home Page under Continual Professional Training (CPT) Management.
- (2) **Delete CPT**: To delete a Certification that is no longer required, click the <u>Manage</u> link and then <u>Delete</u> link next to the certification.

NOTE: If the Continual Professional Training Certification for your Employee is not on the drop down menu, contact the System Administrator to add additional certifications.

c. **Employee Training Record**:

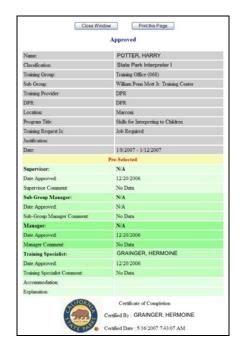
(1) **View**: To view the Employee's Training Record, click the <u>View</u> link in the Training Record column. This screen will list all training programs and instructor hours that have been added to the ETMS. The screen will look similar to this:

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NOTE: Training records prior to year 2000 are stored in hard copy at the Mott Training Center.

(a) Program Title: If the program title has a hyperlink, you can click this link to view details of the Training Request. This screen can be printed and included with a Travel Expense Claim for reimbursement. The screen will look similar to this:



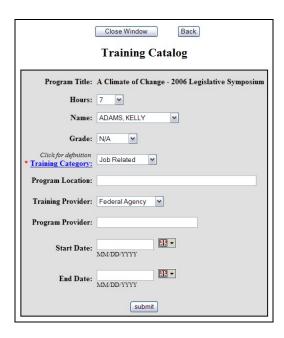
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(2) **Add**: To add a program to an Employee's Training Record, click the <u>Add</u> link in the Training Record column. A list of all programs in the Training Catalog will be presented in an <u>A-Z</u> listing or search by program title. The screen will look similar to this:



(a) Click the <u>Submit</u> link in the Roster column and complete the required information and **submit**. The page will look similar to this:

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(b) In order to submit a Training Request, the training program must be listed in the Training Catalog. If the program does not exist in the Training Catalog, you have the ability to request that the program be added to the Training Catalog. By clicking the <u>SUBMIT</u> link, the Request to Add Program screen will appear in a pop up window. Complete all required fields and submit. The screen will look similar to this:

	t to Add Progra	
Type Out-Service ▼		
Program Title		
Trogram Title		
		~
Category	~	
Program Length	-	
Select V hours		
Repeat Interval		
N/A Months		
P.O.S.T		
N/A 💌		
P.O.S.T Subject	~	
Topics		
Topics		^
		V
Description		
		~

(c) Once you click the **submit** button, this request will be sent to the System Administrator for approval action and

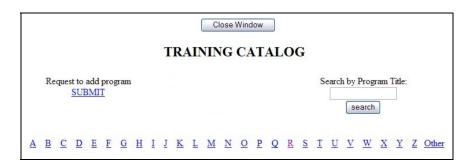
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inclusion into the Training Catalog. The screen will look similar to this:

Close Window

Your request to Add a Program to ETMS has been submitted.
You will be receiving notification via e-mail once action has been taken.
If the training program is approved, you will need to log into the system to submit a
Training Request or Training Attendance Roster.

d. **Training Request**: To submit a Training Request for an Employee, click the <u>Submit</u> link in the Training Request column. This will display the current Training Catalog. The screen will look similar to this:



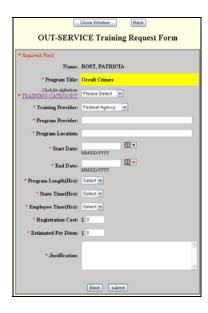
(1) **Training Catalog**: The Supervisor can locate a program in the Training Catalog based on a keyword or an A-Z listing. To search by a keyword, type in the keyword and click **search**. The screen will look similar to this:

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- (a) Click the Program Title link to view the details of the program from the Training Catalog.
- (b) Training Request column.
 - [1] To complete an Out-Service Training Request click the <u>Submit</u> link, an **Out-Service Training Request** will appear; complete all required fields and **submit**. The screen will look similar to this:

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[2] To complete an In-Service Training Request click the <u>View Schedule</u> link, the dates from the current training schedule for the program will appear. If "No Data" is listed, the program has not been scheduled and a Training Request can not be submitted at this time. The screen will look similar to this:

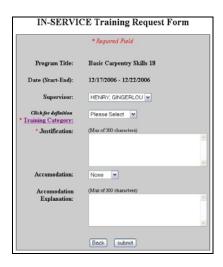


[a] To sign up for the program, click the <u>Program</u>

Date link and the **In-Service Training**

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Request will appear. Complete the required fields and click **submit**. The screen will look similar to this:



- (2) Request to Add Program: If the program does not exist in the Training Catalog, the Supervisor has the ability to add the program by clicking the Request to Add Program <u>SUBMIT</u> link.
- e. **P.O.S.T. Compliance**: To access the P.O.S.T. Compliance Report, click the Employee link within the drop down menu, a page will appear that will look similar to this:

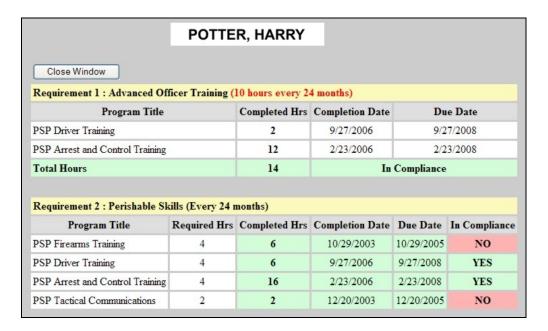


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By clicking the <u>P.O.S.T.</u> link, a Compliance Report will appear for all State Park Peace Officers assigned to the Supervisor and the status of their P.O.S.T. training. The screen will look similar to this:

P.O.S.T (C.P.T.) Compliance Report					
Name	Classification	In Complian			
POTTER, HARRY	Lifeguard Supervisor I	NO			
BLACK, SIRIUS	State Park Ranger	NO			
WEASLEY, RON	State Park Ranger	NO			
GRAINGER, HERMOINE	Lifeguard	YES			
DOE, JOHN	State Park Ranger	NO			
HITCHCOCK, ALFRED	State Park Ranger	NO			
WAYNE, JOHN	Lifeguard	YES			
DICK, MOBY	State Park Ranger	NO			
LADD, ALAN	State Park Ranger	NO			
ROGERS, GINGER	Supervising State Park Ranger	NO			
ASTAIRE, FRED	State Park Ranger	NO			
CABLE, CLARK	Lifeguard	NO			

(1) To see the specific details of an Employee's Compliance Report, click the Employee's name and you will be linked to their P.O.S.T. Management screen. The screen will look similar to this:



NOTE: It is the Supervisor's responsibility to insure that their Employees are in compliance at all times.

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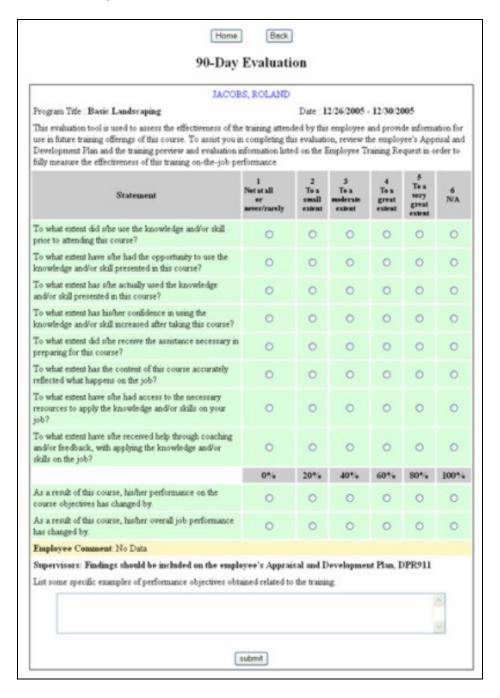
B. Evaluation(s): The 90-Day Evaluation process is intended to provide a bridge between classroom instruction and on-the-job application of training. The information obtained through this process will assist the Employee, Supervisor, and Training Center in providing a return on the training investment. By clicking on Evaluation(s) link within the Supervisor drop down menu, a screen will appear that will look similar to this:

	Home Back
Name	Program Title (Start Date - End Date)
BREAKFIELD, CONNIE	<u>Supervisory Practices</u> (11/26/2006 - 12/1/2006)
BURNER, ROY	Firearms Instructor Refresher (12/10/2006 - 12/15/2006)
CURRY, MICHAEL	NO DATA
GARDNER, MICHELLE	<u>CAMP - Executive</u> (11/1/2006 - 11/3/2006)
GRENNELL, CHARLES	Firearms Instructor Refresher (12/10/2006 - 12/15/2006)
HOWARD, GARY	<u>Firearms Instructor Refresher</u> (12/10/2006 - 12/15/2006)
JACOBS, ROLAND	<u>Firearms Instructor Refresher</u> (12/10/2006 - 12/15/2006)
LATTA, HAROLD	NO DATA
LEMLEY JR, FLOYD	NO DATA
LONG, JAMES	NO DATA
MARQUETTE, LOUIS	<u>Firearms Instructor Refresher</u> (1/21/2007 - 1/26/2007) <u>Firearms Instructor Refresher</u> (12/10/2006 - 12/15/2006)
MICHEL, STEPHEN	NO DATA
TOPAR, JOHN	Emergency Medical Responder Instructor (12/3/2006 - 12/8/2006) Emergency Medical Responder Instructor Refresher (11/5/2006 - 11/10/2006) Emergency Medical Technician – I Refresher (National Registry EMT – Basic) (11/5/2006 - 11/9/2006) Emergency Medical Technician – I (National Registry EMT – Basic) (10/1/2006 - 10/21/2006)
WILBUR, KENNETH	NO DATA

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 90-Day Evaluation: To complete the 90-Day Evaluation, click the <u>Program Title</u> link in the Program Title column. The screen will look similar to this:

NOTE: Before completing, the Supervisor should meet with their Employee to discuss the steps that were taken to apply this training at the workplace.



a. Complete all required fields and **submit**.

(1) **Employee Comment**: The Employee Comment is included.

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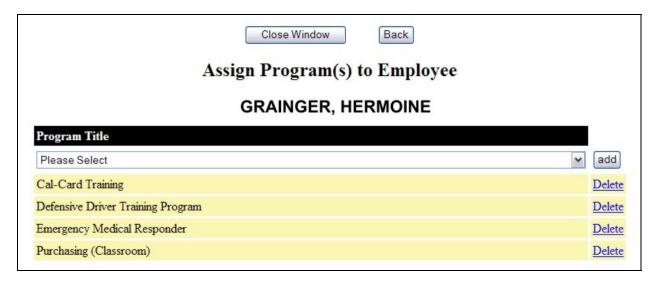
C. **Program(s)-Employee**: A Supervisor can assign programs from the Training Catalog to an Employee based on their position. By clicking the Program(s)-Employee link within the Supervisor drop down menu, a screen will appear that will look similar to this:



1. **Employee's Home Page**: Click the Employee's name to view their Home Page.

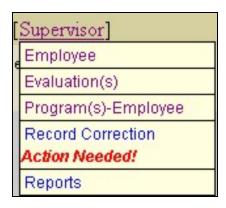
NOTE: Prior to assigning programs to an Employee, the Supervisor must consider programs that have already been listed on their Home Page under Required Programs.

2. **Required Programs**: Click the # link in the Programs Required column, a screen will appear that will look similar to this:



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- a. To add a Required Program to an Employee, select a program from the drop down menu and click **add**. This program will now be added to the **Required Programs** listed on their Home Page.
- b. To remove a program, click **Delete**. This Program will be removed from this screen and from the Employee's Home Page.
- D. Record Correction: Employees have the ability to request a correction to a training program on their Training Record. The Supervisor will be notified via email of a pending Record Correction request and Action Needed! will appear under the Record Correction link.

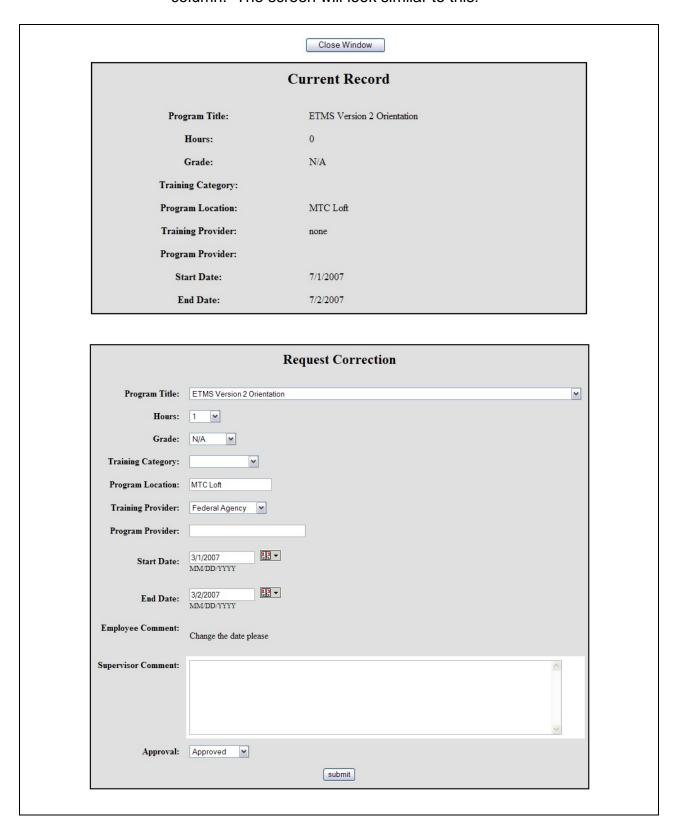


1. By clicking the <u>Record Correction</u> link within the Supervisor drop down menu, a screen will appear that will look similar to this:



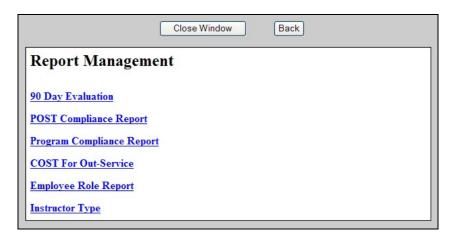
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a. **Record Correction**: Click the <u>Program</u> link under Program Title column. The screen will look similar to this:



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- (1) **Current Record**: Displays the current Training Record.
- (2) Request Correction: Displays the corrected Training Record with Employee comment. The Supervisor has the ability to edit the record as well as provide a comment.
 - (a) **Approved**: Select approved and click **submit** the Record Correction will then be forwarded to the Training Coordinator or System Administrator for approval action.
 - (b) **Disapproved**: Employee will receive an email indicating the correction was not approved.
- E. **Reports**: By clicking the <u>Reports</u> link within the Supervisor drop down menu, a screen will appear with several standard reports. The screen will look similar to this:

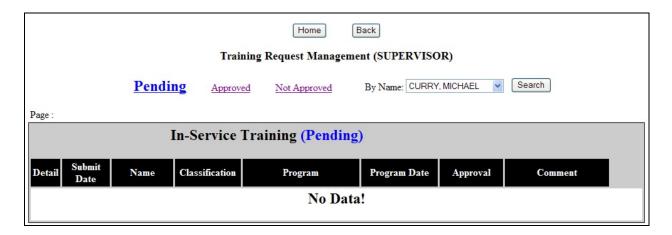


- 1. **Review Reports**: Click the report you want to view and complete the required fields and submit.
- II. TRAINING REQUEST MANAGEMENT: To manage all In-Service and Out-Service Training Requests for their Employees, a task bar called

 Training Request Mgt: SPVR:IN(0)-OUT(0) is located on their Home Page. The number within the parenthesis is the link to the number of pending In-Service or Out-Service Training Requests that require action by the Supervisor.

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A. **In-Service Training Request**: By clicking the (#) link, the Supervisor can view all Pending, Approved and Not Approved Training Request. The screen will look similar to this:



NOTE: The link defaults to the Pending In-Service Training Request.

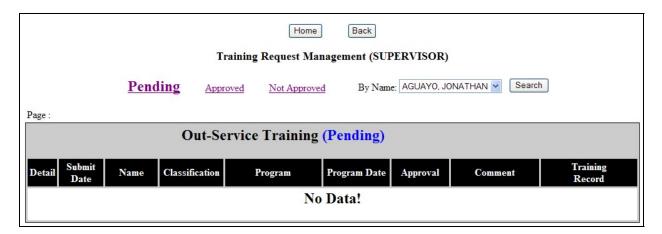
1. <u>Pending</u>: This link displays all Training Requests that are pending approval action by the Supervisor. The screen will look similar to this:



- a. **Detail:**
 - (1) **View**: Click the <u>View</u> link to display the details of the Employee Training Request.
 - (2) **Cancel**: Click the <u>Cancel</u> link to cancel a Training Request prior to the Sub-Group Manager or Manager taking approval action.
- b. **Approval Action**: From the drop down menu in the Approval column, the Supervisor can Approve or Not Approve the Training

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- Request. If Not Approve is selected, the Supervisor must provide a comment.
- c. **Submit**: The Training Request will be sent to the Sub-Group Manager or Manager for their approval action.
- 2. <u>Approved</u>: This link displays all Training Requests that have been approved by the Supervisor. Supervisors have the ability to cancel or edit any approved Training Requests that they have not been acted upon by the Sub-Group Manager or Manager.
- 3. <u>Not Approved</u>: This link displays all Training Requests that have not been approved by the Supervisor. Supervisors have the ability to cancel or edit any Training Requests they have not approved.
- 4. **Search by Employee Name**: The Supervisor has the ability to view all Training Requests that have been submitted by an Employee. Select the Employee from the drop down menu and click the <u>Search</u> link.
- 5. **Page**: There are nine records displayed per page. To view additional records click the page # link(s).
- B. **Out-Service Training Request**: By clicking the (#) link, the Supervisor can view all Pending, Approved and Not Approved Training Request. The screen will look similar to this:



NOTE: The link defaults to the Pending In-Service Training Request.

 Pending: This link displays all Training Requests that are pending action by the Supervisor. The screen will look similar to this:

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a. **Detail**:

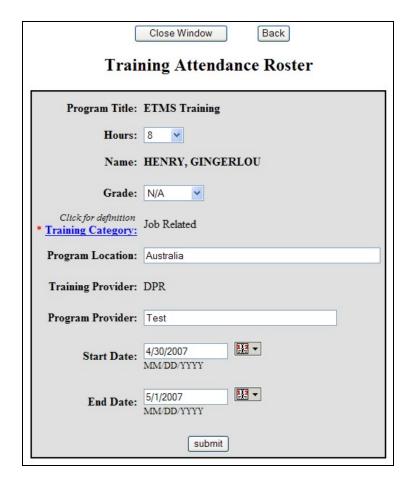
- (1) **View**: To view the details of the Employee Training Request, click the <u>View</u> link.
- (2) **Cancel**: To cancel a Training Request prior to the Sub-Group Manager or Manager taking action, click the <u>Cancel</u> link.
- b. **Approval Action**: From the drop down menu in the Approval column, the Supervisor can Approve or Not Approve the Training Request. If Not Approve is selected, the Supervisor must provide a comment.
- c. **Submit**: The Training Request will be sent to the Sub-Group Manager or Manager for their approval action.
- Approved: This link displays all Training Requests that have been approved by the Supervisor. Supervisors have the ability to cancel or edit any approved Training Requests that they have not been acted upon by the Sub-Group Manager or Manager. The screen will look similar to this:



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a. **Detail**

- (1) **View**: Click the <u>View</u> link to view the details of the Training Request.
- (2) **Cancel**: Click the <u>Cancel</u> link to cancel any Training Request that the Sub-Group Manager or Manager has not taken approval action.
- b. **Training Record**: Once the Supervisor has certified that the Employee has completed the Program, click the <u>Submit</u> link to add the program to the Employee's Training Record. The screen will look similar to this:



- (1) Review the program information and edit as required and click **submit**. The program has now been added to the Employee's Training Record.
- 3. <u>Not Approved</u>: This link displays all Training Requests that have not been approved by the Supervisor. Supervisors have the ability to cancel or edit any Training Requests they have not approved.

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- 4. **Search by Employee Name**: The Supervisor has the ability to view all Training Requests that have been submitted by an Employee. Select the Employee from the drop down menu and click the <u>Search</u> link.
- 5. **Page**: There are nine records displayed per page. To view additional records click the page # link(s).
- III. COURSE LEADER MANAGEMENT: To manage all Course Leader Requests for their Employees that have the Instructor Role, a task bar called

 Course Leader Mgt: SPVR: (1) is located on their Home Page. The number within the parenthesis is the link to the number of pending Course Leader Requests that require action by the Supervisor.
 - A. **Course Leader Request**: By clicking the (#) link, the Supervisor can view all Pending, Approved and Not Approved Course Leader Request. The screen will look similar to this:

Home Course Leader Request- Supervisor									
	Pending Approved		Not Approved						
Detail	Course Leader	Program Detail	Date/Time Requested	Total Hours	Instructor Approval	Supervisor Approval	SGM Approval	Manager Approval	Training Specialist
<u>View</u>	WAGY, STEVEN	Administrative Workshop Test v 3 North Pole	Fundamentals of Personnel 12/26/2007-12/26/2007 (0800-1100)	3	Approved 9/24/2007	HENRY, GINGERLOU Approval: Yes No	COMBS, CHARLES Pending	GREEN, MICHAEL Pending	HENRY, GINGERLOU (831) 649-2954

NOTE: The link defaults to the Pending Course Leader Request.

- 1. <u>Pending</u>: This link displays all Course Leader Requests that are pending approval action by the Supervisor.
 - a. **Details**: To view the Course Leader Request, click the <u>View</u> link. The screen will look similar to this:

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Close Window

Date: 9/24/2007

To: SUPERVISOR

Mott District

From: Department of Parks and Recreation

Training Office

Subject: Course Leader Request

Your Approval is requested for: STEVEN WAGY to serve as a course leader in : Administrative Workshop

Test v 3

Location : North Pole

Comment:

Testing Supervisor pending page.

Course Title Date Time

Fundamentals of Personnel 12/26/2007-12/26/2007 (0800-1100) 3 hour(s)

This request will involve 3 hour(s) of instruction, plus travel time.

Once approved, WAGY, STEVEN will help provide quality training and effective instruction. We impress upon our staff and students a strong professional appearance and would like the course leaders to be a good example of that professionalism. Proper office attire should be worn at all times.

All overtime and per diem expenses that WAGY, STEVEN incurs will be paid by the Training Office. Pease ensure that a copy of the Monthly Work Report, DPR 511, for any overtime incurred during this training is forwarded to the Training Center. In addition, the Travel Expense Claim should be sent to the Training Office for final approval and coding.

If you have any questions regarding this request, please contact HENRY, GINGERLOU at ginger@parks.ca.gov or (831) 649-2954. Your support and assistance in the delivery of our departmental training program is appreciated.

Michael D. Green

Acting Department Training Officer

b. Supervisor Approval:

- (1) **Approve:** To approve a Course Leader Request, click the <u>Yes</u> link under the Supervisor Approval column. An email is generated by ETMS and sent to Sub-Group Manager or Manager for approval action.
- (2) **Not Approved**: To not approve a Course Leader Request, click the No link under the Supervisor Approval column. Complete the comment and click **Submit**. The screen will look similar to this:

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	Home Course Leader Request- Supervisor									
Detail	Course Leader	Program Detail	Pending Date/Time Requested	Total Hours	Approve Instructor Approval	Not Approved Supervisor Approval	SGM Approval	Manager Approval	Training Specialist	
View	WAGY, STEVEN	Administrative Workshop Test v 3 North Pole	Fundamentals of Personnel 12/26/2007-12/26/2007 (0800-1100)	3	Approved 9/24/2007	HENRY, GINGERLOU Please submit your reason for not approving this Course Leader Request? Comment:	COMBS, CHARLES	GREEN, MICHAEL Pending	HENRY, GINGERLOU (831) 649-2954	

The system will generate an email to the Training Specialist with a copy to the Instructor.

- 2. <u>Appproved</u>: This link displays all Course Leader Requests that have been approved by the Supervisor.
- 3. Not Appproved: This link displays all Course Leader Requests that have not been approved by the Supervisor.

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